DOCUMENT RESUME

ED 156 858 CE 017 040

TITLE	Marketing and Distributive Education. Wholesaling Curriculum Guide.
INSTITUTION	Northern Illinois Univ., DeKalb. Dept. of Business Education and Administration Services.
SPONS AGENCY	Illinois State Office of Education, Springfield. Div. of Adult Vocational and Technical Education.
PUB DATE	May 78
NOTE	111p.; Not available in hard copy due to reproducibility problems; For related documents see CE 017 039-043
EDRS PRICE	MF-$0.83 Plus Postage. HC Not Available from EDRS.
DESCRIPTORS	Business Education; Communications; Curriculum Guides; *Distributive Education; Economics; Educational Objectives; Human Relations; *Job Skills; *Learning Activities; Management; *Marketing; Mathematics; Merchandising; Occupational Information; Post Secondary Education; Producer Services; *Resource Materials; Salesmanship; Secondary Education; *Wholesaling

ABSTRACT

This document is one of four curriculum guides designed to provide the curriculum coordinator with a basis for planning a comprehensive program in the field of marketing as well as to provide marketing and distributive education teachers with maximum flexibility. Introductory information provides directions for using the guide and information on careers in wholesaling. This guide covers the following nine areas of instruction: communications, human relations, marketing economics, management, mathematics, merchandising, operations, product and/or service technology, and selling. The basic format for each instructional area is the same and contains the following elements: cluster instructional objectives to facilitate the organization of instruction; essential common and specialized competencies; suggested learning activities; and references. This marketing series includes a master guide on general marketing (CE 017 042) and three curriculum guides, which cover general retail merchandising (CE 017 039), wholesaling (CE 017 040), and food marketing (CE 017 043). A planning guide (CE 017 041) accompanies this series and four related business curriculum guides (ED 114 560, ED 133 434, and ED 146 356-357). (BM)

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MARKETING AND DISTRIBUTIVE EDUCATION:

WHOLESALING CURRICULUM GUIDE

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MAY 1978

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CE 017 040

FOREWORD

The *Marketing and Distributive Education Curriculum Guide in Wholesaling* has been designed to provide the curriculum coordinator with a basis for planning a comprehensive program in the career field of marketing and to allow marketing and distributive education teacher-coordinators maximum flexibility. A variety of suggested learning activities are provided to enable teachers to determine which one(s) would best serve their teaching methods and their students' learning styles. Similarly, a variety of references are listed so that the teachers will be aware of available educational materials in their local educational agencies and be able to secure them readily by consulting the bibliography of instructional materials in the *General Marketing Guide*.

The Illinois Office of Education, Department of Adult, Vocational and Technical Education is committed to assisting local communities in the development of quality instructional programs to prepare and upgrade persons for productive careers in the following 15 instructional program areas in the field of marketing: Advertising; Apparel and Accessories; Automotive-Petroleum; Marketing Services; Finance and Credit; Food Marketing; Food Service; General Retail Merchandising; Hardware-Building Materials, Farm and Garden; Home Furnishings; Industrial-Materials Handling; Lodging-Recreation and Tourism; Small Business Management; Transportation and Warehousing; and Wholesaling.

This publication should be used in conjunction with *Marketing and Distributive Education Curriculum Planning Guide*. Additional publications which have been developed by the Illinois Office of Education, Department of Adult, Vocational and Technical Education that are designed to prepare individuals for careers in marketing include:

1. *Marketing and Distributive Education Curriculum Guide in General Marketing*
2. *Marketing and Distributive Education Curriculum Guide in General Retail Merchandising*
3. *Marketing and Distributive Education Curriculum Guide in Food Marketing*
4. *Owning and Operating a Small Business: Strategies for Teaching Small Business Ownership and Management*
5. *Clothing Apparel and Accessories Merchandising Guide*
6. *Home Furnishings Merchandising Guide*
7. *Hospitality Education: A Guide for High School Teachers.*

The research process included a careful study of the competency and career research in the field, intensive input from a jury of 7 wholesaling executives, interviews of 30 Order Pickers employed throughout the state of Illinois, and field testing and critiquing of the first-draft copies of the curriculum guide by marketing and distributive education teacher-coordinators in over 100 schools in Illinois.

Sincere appreciation is extended to the wholesaling jury members that are identified in the Research Procedures section of the *Marketing and Distributive Education Curriculum Guide in General Marketing*, to the 30 wholesaling employees who were interviewed, and to the 100 teacher-coordinators in the state of Illinois who assisted in one way or another in the development of this curriculum guide.

A special thank you is extended to the 50 teacher-coordinators in the state of Illinois who conducted interviews of wholesaling employees, participated in seminars throughout the state to review the first-draft copies of the guide, and arranged for dissemination workshops.

Special recognition is given to the following individuals for their many outstanding contributions. Mr. Lauren Housel served as project consultant and Ms. Peggy Pool served as contract monitor representing the Illinois Office of Education, Department of Adult, Vocational and Technical Education. Mr. Edwin Giermak, College of DuPage, was the consultant representing the Illinois Community College Marketing and Management Association. Mr. Paul Reibman was the State of Illinois Secondary Marketing and Distributive Education Association consultant. Mrs. Lucy Crawford, Professor Emeritus, Virginia Polytechnical University, served as the research consultant for the project.

A most heartfelt "thank you" is extended to Ms. Carolyn English, Ms. Patti Staas, Ms. Diane Oltman, and the other members of the Department of Business Education and Administrative Services staff at Northern Illinois University.

MARKETING AND DISTRIBUTIVE EDUCATION CURRICULUM GUIDE IN WHOLESALING

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	Number	Color
Advertising	1	Blue
Communications	2	Goldenrod
Display	3	Yellow
Human Relations	4	Buff
Marketing/Economics	5	Blue
Management	6	Green
Mathematics	7	White
Merchandising	8	Pink
Operations	9	Salmon
Product and/or Service Technology	10	Yellow
Selling	11	Green

IMPORTANT NOTE

The *General Marketing Curriculum Guide* is the master publication and should be studied carefully before using this Guide. **It is important to note that the *General Marketing Curriculum Guide* contains those competencies and learning activities which are common to the following marketing occupations:**

GENERAL RETAIL MERCHANDISING
FOOD MARKETING
WHOLESALING

The use of this guide alone would be inadequate unless the *General Marketing Curriculum Guide* content is also included.

The *General Marketing Curriculum Guide* also contains a bibliography of instructional materials that are referenced in this guide and an explanation of the research procedures used in preparing this curriculum guide.

HOW TO USE THE GENERAL MARKETING, FOOD MARKETING, WHOLESALING, AND GENERAL RETAIL MERCHANDISING CURRICULUM GUIDES

The publication, *Marketing and Distributive Education Curriculum Planning Guide*, and the following four curriculum guides were prepared together during the 1976-1978 period of time: General Marketing, Food Marketing, Wholesaling, and General Retail Merchandising. These four curriculum guides have been designed to provide the curriculum coordinator with a basis for planning a comprehensive program in the field of marketing as well as to provide marketing and distributive education teachers with maximum flexibility. The essential common and specialized competencies have been identified and listed in order of importance based upon structured interviews with General Grocery Clerks, Salespersons, and Order Pickers. A number of suggested learning activities are listed to enable teachers to determine which one or ones would best serve their teaching methods and their students' learning styles. Similarly, a number of references have been listed so that the teachers will be aware of the educational materials available in their school and be able to secure them readily by consulting the bibliography of instructional materials printed in the *General Marketing Curriculum Guide*. Cluster instructional objectives have been provided to facilitate the organization of instruction for the teacher-coordinator. For maximum usefulness, the competencies have been both number and color coded into the following eleven instructional areas:

Competency	Number	Color
Advertising	1	Blue
Communications	2	Goldenrod
Display	3	Yellow
Human Relations	4	Buff
Marketing/Economics	5	Blue
Management	6	Green
Mathematics	7	White
Merchandising	8	Pink
Operations	9	Salmon
Product and/or Service Technology	10	Yellow
Selling	11	Green

These instructional areas are the same ones that are used by the Distributive Education Clubs of America for their competency-based competitive events program and for numerous other curriculum projects in the field of marketing and distributive education.

THE *GENERAL MARKETING CURRICULUM GUIDE* IS THE MASTER PUBLICATION IN THE SERIES AND SHOULD BE STUDIED CAREFULLY BEFORE USING THE OTHER GUIDES. IT IS ALSO IMPORTANT TO NOTE THAT THE *GENERAL MARKETING CURRICULUM GUIDE* CONTAINS THOSE COMPETENCIES AND LEARNING ACTIVITIES WHICH ARE COMMON TO THE FOLLOWING THREE MARKETING OCCUPATIONS: FOOD MARKETING, WHOLESALING, AND GENERAL RETAIL MERCHANDISING. The *General Marketing Curriculum Guide* can be revised to include the competencies which are common to all marketing occupations as future curriculum guides are developed. The loose leaf format is conducive to making these additions without total reprinting.

The Competency Curriculum Planning Grid that is located in the *General Marketing Curriculum Guide* should be studied carefully during the instructional planning process. This grid has been developed to facilitate the planning of large group, small group, and individual instruction. The planning grid can also be helpful in determining which competencies are most important as perceived by the business executives who were members of the jury and by the employees who were interviewed. The opinions of both of these two business groups should be carefully studied in planning what is to be taught.

Blank sample competency implementation worksheets are included in the *General Marketing Curriculum Guide* so that as additional competencies are identified on the local level sheets can be prepared and inserted into the curriculum guides at the appropriate place.

These curriculum guides may be used in a number of different ways depending upon student and community needs, local educational agencies, community learning facilities and resources, teaching style of the teacher, comprehensiveness of the marketing and distributive education curriculum, prior competencies acquired by the students, and other similar factors. Some teacher-coordinators will prefer to help students acquire the competencies listed in the *General Marketing Curriculum Guide* in lower grade level courses, e.g., introduction to marketing and distributive education, marketing and distribution, retailing, or marketing and distributive education laboratory.

Most teacher-coordinators will desire to help their students acquire the specific competencies needed for employment in food marketing, wholesaling, or general retail merchandising in courses taught at the higher grade levels. Area vocational centers, community colleges, and other schools with specialized marketing and distributive education course offerings in the areas of food marketing, wholesaling, and general retail merchandising will find these curriculum materials especially easy to use. Teacher-coordinators in schools without specialized course offerings will find the curriculum materials helpful as they individualize instruction based upon the career objectives of their students.

Instructors for post-secondary and adult students will find the curriculum materials to be especially valuable for preparing individuals to be competent employees for the

first-level marketing position(s) that were researched in the fields of food marketing, wholesaling, and general retail merchandising. The competency-based approach to curriculum development and the individualizing of instruction are viable approaches at all educational levels.

The competencies listed in the guide and the curriculum guides themselves should be considered only as teaching suggestions and not as the complete curriculum. Individual student and community needs as well as the judgment, experience, and opinions of the teachers and advisory committee members should determine the content of the curriculum on the local level. Prior to the instruction in the competencies needed for employment in marketing, the students in all local schools should have carefully studied and explored the wide array of careers in marketing. Increasingly, schools are providing students with an opportunity to better understand themselves and the world of work through a wide variety of career education type activities at various lower grade levels.

In the state of Illinois, a course entitled "Orientation to Business, Marketing, and Management Occupations" is recommended at the ninth grade level. A publication entitled *Orientation to Business, Marketing, and Management Occupations* (1977) has been prepared by the Illinois Office of Education, Department of Adult, Vocational and Technical Education. A curriculum guide for exploring careers in marketing is available from the United States Office of Education. The publication, *Career Marketing and Exploration* (1976), can be ordered through the Superintendent of Documents Office, Public Documents Distribution Center, Pueblo, CO 81009.

The instructional materials listed in the reference column of the curriculum guides and in the bibliography of instructional materials were selected because they are the ones that are most commonly used by teachers in the field. A major effort was made to limit the number of updated references so that the local educational agencies would be able to purchase them if necessary.

The edition number is only listed for those newer publications in which there is an older edition that is currently being used in a large number of schools. In most cases more than one instructional reference is provided. This was done to help insure the local availability of at least one of the references and also to provide flexibility for both the teacher and student in individualizing instruction.

INFORMATION ON CAREERS IN WHOLESALING

The United States has moved from a product producing society to a service producing society. Service industries such as wholesaling have become some of the largest employers. The wholesaling industry offers a wide variety of services to retailers and businesses such as providing the convenience of being able to get goods easily and quickly instead of securing those goods from the point of origin.

The National Association of Wholesalers makes an annual survey of their members to determine what they consider their major problems. For two consecutive years, they have listed their number one problem as that of finding competent personnel. The wholesaling industry, like many others, finds that there is a shortage of competent personnel. Opportunities for a career in wholesaling continue to be excellent.

The wholesaling field has enjoyed a significiant growth in sales from 1919 to 1980. The number of employees in the wholesale trade also shows a corresponding growth. The number of employees has grown from 1,684,000 in 1939 to an estimated 5,000,000 by 1980. It can be seen that over the past 25 years the number of people employed in the wholesale distribution of goods has more than doubled. The wholesaling field offers many excellent job opportunities for individuals with a wide variety of skills.

Earnings in wholesaling compare favorably with other service industries. For example, a person employed as an order picker at the first-level position in the Chicago, Illinois area can earn approximately $7.50 per hour. The exact salary, of course, depends on the location of the wholesaling firm and union affiliation. The state of Illinois, being located in the central portion of the United States with extensive distribution facilities, offers a significant level of employment opportunities in the wholesaling industry.

The following sources can be used for additional career information on wholesaling:

Beaumont, John A., Kathleen H. Langan, and Louise H. Taylor, Ed.D., *Your Career in Marketing*, New York: Gregg Division, McGraw-Hill Book Co., 1976.

Bikkie, James A. and Eugene L. Dorr, *Careers in Marketing*, New York: Gregg Division, McGraw-Hill Book Co., 1978.

Eggland, Steven A., *Exploring Wholesaling and Retailing Careers*, Cincinnati, Ohio: South-Western Publishing Co., 1976.

Grandfield, Raymond J. and Faye Gold, *Working For a Wholesaler*, New York: Fairchild Publications, Inc., 1973.

"Marketing Careers" (filmstrip), *Careers in Focus Series*, New York: Gregg Division, McGraw-Hill Book Company, 1976.

There is one common marketing first-level position in wholesaling. The most commonly identified first-level position is called ORDER PICKER. This position is also sometimes called ORDER SELECTOR or ORDER ASSEMBLER. However, leaders in the wholesaling industry indicated that the job title of ORDER PICKER is the most common.

The typical job description of ORDER PICKER

includes: locating items called for on dealers' orders, picking these items and placing them on truck, skid, or other conveyance and transporting them to the packing area designated. Employees must have a working knowledge of warehouse procedures, particularly those affecting disposition of incoming stock and filling orders. They may also be called on to perform other duties such as stockperson. Because of the nature of the position, identifiable physical and emotional traits are important for individuals pursuing a career in wholesaling. Because wholesaling covers many different types of merchandise, it is somewhat difficult to make general statements that apply to all wholesaling firms. However, personal traits should be considered, and the wholesaling firm being considered as employment should be studied to determine if these traits will apply or become important features of the job.

One very important physical trait is the ability to work with one's hands. Because of the nature of the selection process, picking merchandise and placing this merchandise in boxes, bins, etc., the employee needs to be coordinated. Being able to lift merchandise is an additional important requirement of the job. When the product is selected or "picked," the bin or stock area where the merchandise is located may be above the order picker's head. The weight of the product will vary, of course, depending on the type of the wholesaling firm. Some wholesale firms use carts, either pulled or powered. The employee must be able to maneuver these carts up and down the aisle. In some wholesaling firms, baskets are carried by the order picker and the merchandise is placed in the basket until either the basket is filled or the order is completed. Most order pickers are on their feet for long hours. An extensive amount of walking up and down the stock aisles is also necessary.

One mental trait necessary is the ability to read orders. Order picking is a very exacting process that requires a high degree of accuracy. More and more firms are using some type of computer system in assisting the order filling process. The employee must be able to read numbers correctly from the order selecting sheet and then match those numbers with the merchandise to be picked.

The emotional traits associated with order picking deal mainly with being able to work alone or with minimum contact with other employees. Even though a number of employees are doing the same thing, each employee is responsible for any given order. There is very little order picking activity that involves more than one person. The order picker does not necessarily work without personal contact, but most employee contact is when two pickers are working the same aisle and even then, that contact is minimal. The order picker must be able to work in conditions somewhat less desirable than many other marketing occupations, as most warehouses are not air conditioned. The noise level is also sometimes quite high especially if some type of conveyor system is used to transfer the merchandise after it is filled to where it is packed and moved to the loading area.

The responsibilities of the order picker require extreme accuracy in picking orders and proper care or handling of the merchandise being picked. Most order picking systems set up by wholesalers are not difficult to master but need to be followed precisely. Most firms will dismiss employees if those procedures are not followed explicitly.

Personnel in wholesaling businesses are very concerned with job enrichment. There is great potential for job advancement in the wholesaling industry. The flexibility that the wholesaling industry affords the employee is unique in a sense that from the position of order picker, an employee can move in one of three different career directions.

First, an individual may desire to stay within warehouse operations. A large number of employees enjoy order picking and choose to remain in that position because they like to control when they work and the job security. Employees who stay within the ranks of the union are insured of a certain amount of job security. However, all employees do not want to become supervisors. This is not because of the lack of ability. Some employees enjoy the freedom of the position and not having to worry about taking work-oriented problems home. Industry leaders all agreed that no matter which avenue the employee wishes to follow, experience in the job of order picker is extremely valuable. If an employee stays within the warehouse operation, they would have an opportunity to be promoted to advanced positions dealing with the warehouse procedures. Warehouse management could be another term used to describe the career field.

A second career path possibility is to move into warehouse/sales area. This path may or may not require experience in the warehouse first, but it does require additional training. The selling positions can be both within the warehouse or outside the warehouse as a contact salesperson.

The third career path open to employees in the wholesale industry is warehouse/office. Industry leaders indicated that more office supervisors and managers came from the warehouse ranks rather than by being promoted through the office employee ranks. The experience gained by working in the warehouse is of benefit in job promotion in this area also. The most commonly identified second-level positions in warehouse operations are shipping clerk, unloader/loader, packer, and salvage (repack) clerk. The second-level warehouse/office jobs are cycle counter clerk and order processing clerk. The second-level warehouse/sales job is a combination position with various titles such as customer service and counter/order clerk. Promotional criteria for individuals promoted to second-level positions include, in addition to having the ability to perform the job of order picker in a most efficient and effective manner, the ability to demonstrate the following personal characteristics and job competencies:

1. ability to work with people
2. oral and written communication skills
3. attendance
4. punctuality
5. previous work experience
6. seniority in firm
7. attitude toward work, job, and company
8. ability to work without supervision
9. initiative
10. quality and quantity of work.

The most common third-level positions include that of stocker/replenisher, inventory control clerk, purchasing clerk, and counter/sales clerk. The promotional criteria for third-level positions include a careful evaluation of past performance plus potential for achieving the following abilities and competencies:

1. trustworthiness and honesty
2. computational skills
3. proper care of equipment
4. knowledge of product, procedures, and of wholesaling industry
5. human relations skills
6. ability to be systematic in performing job
7. knowledge of union-based contracts
8. willingness to be flexible in hours worked.

The most common fourth-level positions include receiving and shipping clerk, order checker, traffic clerk, rebuyer, and assistant office salesperson.

The fifth-level position identified were: lead group person, assistant buyer-expeditor and quotation/pricing salesperson. A wide array of sixth and higher level positions were identified by the jury members; however, the size of the firm and type of internal organization played a major role in determining the level of the position.

The employment potential and/or advancement available to those students wishing to pursue a career in the wholesaling industry is illustrated in the following charts. In addition to showing the jobs for each level, the job descriptions are also provided. There is a need to discuss career opportunities with wholesalers on the local level to learn if there are any differences in career opportunties in their firm than those described in this section. Keep in mind that the number of positions in each level will vary depending on the size of the wholesaling firm.

The next few pages contain information that illustrates the various career levels in the field of wholesaling and includes descriptions of some of the lower level jobs.

WHOLESALING CAREER LEVELS

6

Warehouse Supervisor	Purchasing Agent	Operations Manager	District Manager
Warehouse Superintendent	Traffic Supervisor	Office Salesperson	Branch Manager
Warehouse Manager	Asst. Operations Manager	Head Office Salesperson	Regional Manager
Rebuyer	Credit Manager	Outside Salesperson	National Manager

5 Leading Group Person, Assistant Buyer-Expeditor, Quotation/Pricing Salesperson

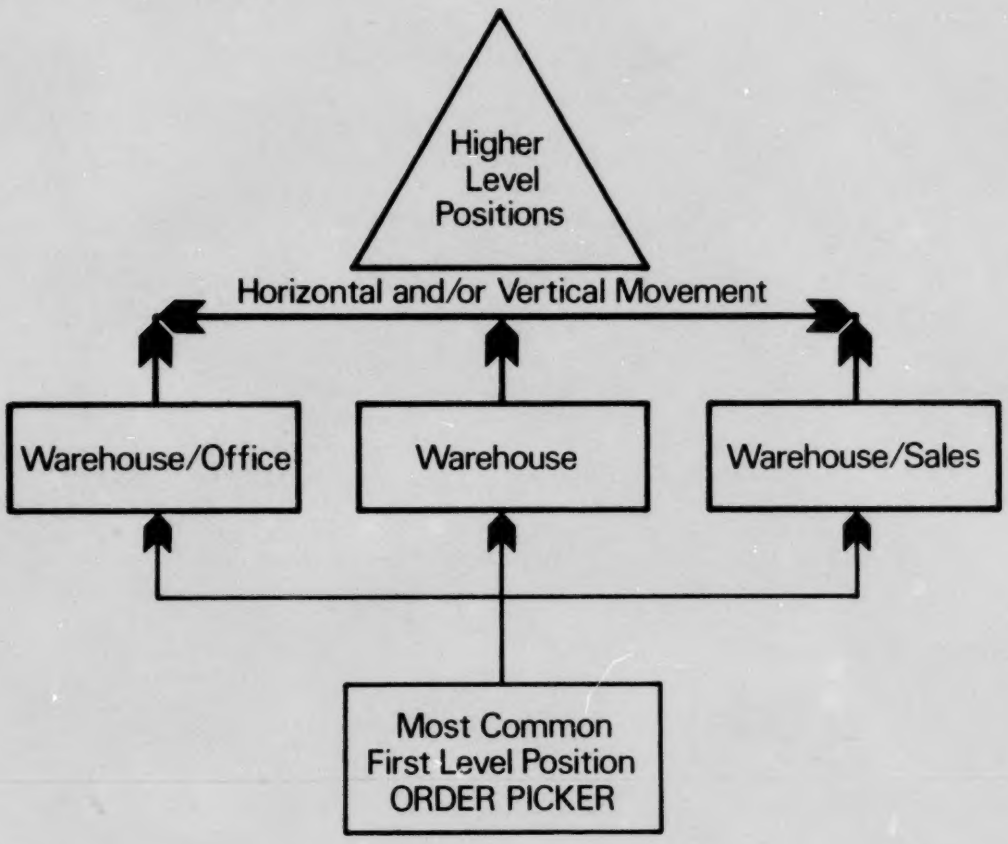
4 Receiving and Shipping Clerk, Order Checker, Traffic Clerk, Rebuyer, Assistant Office Salesperson

3 Stocker/Replenisher, Inventory Control Clerk, Purchasing Clerk, Counter/Sales Clerk

2 Shipping Clerk, Unloader/Loader, Packer, Salvage Clerk, Customer Service, Counter/Order Clerk, Cycle Counter Clerk, Order Processing Clerk

1 Order Picker

WHOLESALING CAREER LEVELS
(Not Ladders)



JOB DESCRIPTIONS OF THE MOST COMMON SECOND AND THIRD LEVEL WHOLESALING POSITIONS

LEVEL TWO POSITIONS

WAREHOUSE

Shipping Clerk
Takes finished or packed orders and loads the orders onto trucks, rail cars, etc., for shipping.

Unloader/Loader
Unloads incoming merchandise from rail cars, trucks, etc., to storage and stock holding areas.

Packer
Takes filled order, prepares and packs order for movement to shipping area.

Salvage (Repack) Clerk
Repacks partially damaged cases of merchandise and combines to make full cases in order to place merchandise back in stock area.

WAREHOUSE/OFFICE

Order Processing Clerk
(General Clerk)
Implements the flow of orders. May utilize data processing techniques to achieve goal.

Cycle Counter Clerk
Maintain perpetual inventory control systems. Sometimes this position is considered to be more of a warehouse than an office position.

WAREHOUSE/SALES

Customer Service/
Counter/Order Clerk
Takes orders over the phone or from customers coming into the warehouse.

LEVEL THREE POSITIONS

WAREHOUSE

Stocker/Replenisher
Deals with mechanical or manual movement of goods from the storage area to the stock area. Goods can be moved by fork lift or hand trucks with the merchandise being loaded on pallets.

WAREHOUSE/OFFICE

Inventory Control Clerk
Counts and compiles records of merchandise on hand. Compares inventories taken by other workers with office records and computes figures from sales or other records.

Purchasing Clerk
Compiles information and records dealing with purchase orders for the procurement of merchandise. Searches inventory records or warehouse to determine if sufficient stock is on hand.

WAREHOUSE/SALES

Counter/Sales Clerk
Works with taking orders over the phone or from customers coming into the warehouse. Works inside. The location of their position depends on the size of the firm.

Cluster Instructional Objective: ABILITY TO RELATE IMPORTANCE OF ASSIGNING DUTIES AND DELEGATING AUTHORITY

W-1

Communications

2 What Does the Competent Marketing Employee Do?

100-Knowledge of/or Understanding that

The approaches which can be used in assigning duties and delegating authority so that everything is completely clear.

Common to Food Marketing

Suggested Learning Activities

Have students view the film "Instructions or Obstructions" Bureau of National Affairs, 1615 Fishers Lane, Rockville, Maryland 20852.

Have students visit two businesses and obtain approaches used in assigning duties and delegating authority within the company. Then students can write a paper summarizing the information gathered.

Appoint committee chairpersons for a DECA project. Make the chairperson responsible for delegating responsibilities to complete the project. The chairperson should assign each student some specific responsibility necessary for the completion of the project.

Have students develop an organization chart for their training station. Then students can compare their chart with those of other class members. The students can identify similarities and differences.

The following statements were made by a supervisor. Rewrite each so that it is clear and tactful.

1. "These unpacked boxes are cluttering the backroom."

(Continued following page)

References

LAP 34-100

Oklahoma Distributive Education III

Retailing Principles and Practices
Part 57

Communications in Marketing
Chapter 4

Human Relations in Marketing
Chapters 4, 6, 8
(2nd Edition)

Communications in Marketing
Chapters 3, 7, 1
(2nd Edition)

Communication at Work
Unit 4

Cluster Instructional Objective: ABILITY TO RELATE IMPORTANCE OF ASSIGNING DUTIES AND DELEGATING AUTHORITY (CONTINUED)

2 What Does the Competent Marketing Employee Do?

100-Knowledge, etc.

Suggested Learning Activities

2. "The display windows sure are dirty!"
3. "Doesn't anyone else around here straighten the merchandise except me?"
4. "I wonder who I can get to work tomorrow night."
5. "Handle this return of merchandise!"

References

Cluster Instructional Objective: ABILITY TO INTERPRET MANAGEMENT'S POLICIES

W-3

Communications

2 What Does the Competent Marketing Employee Do?

124-Skill

Skill in interpreting management's policies to employer and employee's problems to management.

Common to Food Marketing

Suggested Learning Activities

Present to the students a case problem where an employee(s) actions conflict with the store's policy (i.e., coming late to work two or three times a week). Have students react to how they would explain the policy to the employee (i.e., when the policy states "All employees are expected to arrive to work before the assigned time so employees will be ready for work and not preparing to go to work at the assigned time.")

Have students either write a reaction paper or give an oral presentation to the following situation. "Jim, a fellow worker, has a body odor problem. Since the weather has been getting hotter you have noticed the odor is getting worse. You find the smell offensive. What would you do to correct the situation?" Also determine what type of an approach they would take; written, oral, formal, informal, etc.

Give students a list of company policies and have one student explain the reasons for two or three specific policies to the rest of the group. Suggested areas for discussion; pay, hours, safety rules, requesting time off.

References

LAP 45-124

Communications in Marketing
Chapters 4, 5

Retailing Principles and Practices
Part 56

Retail Merchandising
Chapter 5

Fundamentals of Selling
Chapters 5, 7

Produce Merchandising
Assignment 13

Grocery Merchandising
Assignment 2

Communications in Marketing
Chapters 1, 2, 6, 7
(2nd Edition)

Communication at Work
Unit 1 and Unit 2

Cluster Instructional Objective: COMPREHEND THE EFFECT OF MORALE TO JOB PERFORMANCE

4 Human Relations

What Does the Competent Marketing Employee Do?

272-Knowledge of/or Understanding that

Knowledge that morale as being the term frequently used to describe employee attitudes toward their jobs, employer and fellow employees.

Common to Food Marketing

Suggested Learning Activities

Have students read the section on "Building the Sales Force" and the chapter on "Management Action to Improve Human Relations."

Have students prepare a list of benefits offered by their training station which builds morale on the job. Students should list more than just normal "fringe benefits."

Have students write a paper on morale at their training station. If the student believes the morale is low, they should offer suggestions on how it could be improved. If the student believes the morale is good, they should explain why they think it is that way.

References

LAP 16-272

Fundamentals of Selling
Chapter 15, b

Psychology and Human Relations in Marketing
Chapter 7

Grocery Merchandising
Pages 1-4

Produce Merchandising
Pages 1-4

Communication in Marketing
Chapters 1, 8
(2nd Edition)

Human Relations in Marketing
Chapters 7, 8
(2nd Edition)

Growing on the Job
Unit I

Communications at Work
Chapters 4

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF COMPLYING WITH POLICIES AND PROCEDURES

Human Relations

4

What Does the Competent Marketing Employee Do?

325-Attitude

The attitude that employees should accept and comply with the policies and procedures of management.

Common to Food Marketing

Suggested Learning Activities

Have students divide a sheet of paper into three columns. In column one, have students identify either three policies at work or at school which they do not totally agree with. In column two, have students tell why they do not think the policy is fair. In column three, have students objectively explain why the policies were established. Then have students answer the following: "Should these be exceptions to the rule? If so, determine what effect this would have on the other employees at work or the rest of the student body. If not, explain." Students should turn their answers to you.

If students belong to an organization within the school or outside of the school, they can identify rules and regulations for the organization. If possible, the students can secure a copy of the policies. Then have students answer the following: (1) Are there any policies that you do not agree with? Why? (2) Why does your organization have policies? Their findings should be presented to you or to the class.

Give student a case problem where one or more employees are ignoring or not comply-

(Continued on following page.)

References

LAP 44-325

Psychology and Human Relations in Marketing
Chapters 3, 7, 8

Human Relations in Business
Chapter 3

Modern Supermarket Operations

Science Research Associates

Produce Merchandising
Assignment 13

Grocery Merchandising
Assignment 2

Human Relations in Marketing
Chapters 4, 6
(2nd Edition)

Growing on the Job
Unit 2

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF COMPLYING WITH POLICIES AND PROCEDURES (CONTINUED)

4 What Does the Competent Marketing Employee Do?	Suggested Learning Activities	References
325-Continued	ing with a policy and act then the question in column three, acting one above.	

Cluster Instructional Objective:

UNDERSTAND THAT HUMAN RELATIONS IS IMPORTANT TO EMPLOYEE PRODUCTIVITY

W-4

Human Relations

4 What Does the Competent Marketing Employee Do?

322-Attitude

An awareness that good human relations helps increase production by stimulating interest and creativeness in employees.

Common to Food Marketing

Suggested Learning Activities

Have students describe a group situation they have experienced where there were poor human relations. Students can describe the effect this situation had on the interest, participation, and contributions made by the group. The same can be done for a good experience in human relations.

Ask a teacher from the social science department who specializes in World War II to speak to the class on how the American people united during the time of war to increase production and to produce at a fantastic rate. Discuss with the class the causes of such an effort and whether or not human relations entered into the situation.

Set up a case problem where students are in charge of a shipping and receiving department or stockroom. Explain to the students that the backroom is not air conditioned and during the summer months there is quite a bit of sickness and absenteeism. Ask students how they would solve the problem of employee morale? Use the case problem solving approach via the 4, 5, or 6 step method.

References

LAP 46-322

Psychology and Human Relations in Marketing
Chapter 1

Retailing Principles and Practices
Part 21

Produce Merchandising
Assignment 13

Grocery Merchandising
Assignment 1,2

Human Relations in Marketing
Chapter 1
(2nd Edition)

Cluster Instructional Objective:

ABILITY TO RELATE THE VALUE OF COMMUNICATION AND MOTIVATION TO EFFECTIVE HUMAN RELATIONS

W-5

Human Relations

4

What Does the Competent Marketing Employee Do?

331-Attitude

An awareness that motivation is closely connected with communication.

Common to Food Marketing

Suggested Learning Activities

Ask students to respond to the following question: "Do you ever feel glad to be working or happy at what you are doing at work? Why?" Once they have answered the question, repeat it three times. Each time you repeat the question, use a different tone of voice. First, yell when asking the question. Second, ask in a threatening but low voice. Third, ask in a positive way. Have students record their reactions to how you ask the question by using an evaluation checksheet. Then discuss how they completed the checksheet and last, explore their answer the very first time the question was asked.

Acquire three employee memorandums; one should talk down to the employee, another should patronize them, and third should show them respect as being part of the organization. Make a transparency of each.

Have students try to pick out the "feeling" of each memorandum. Then discuss motivation and communication with the students.

Stage a confrontation between the principal and teacher in front of the class. Then have students critique the methods and effect on the teacher's motivation.

References

LAP 48-331

Human Relations in Business
Chapter 6

Communications in Marketing
Chapters 1, 7

Retailing Principles and Practices
Parts 38, 39, 56

Produce Merchandising
Assignment 13

Grocery Merchandising
Assignments 1, 2

Human Relations in Marketing
Chapters 4, 6
(2nd Edition)

Communication in Marketing
Chapters 1, 8
(2nd Edition)

Communication at Work
Chapters 1, 3, 4

Cluster Instructional Objective: COMPREHEND THAT SUPERVISORY TRAINING INCREASES UNDERSTANDING

W-6

Human Relations 4

What Does the Competent Marketing Employee Do?

330-Attitude

A recognition that training contributes to an understanding by supervisors the importance of personnel management and the other managerial functions which they must perform.

Common to Food Marketing

Suggested Learning Activities

Have students interview either a local manager or their training supervisor to find out what type of management training programs the company has for potential managers as well as upgrading present managers. Have students make a brief report and turn it in to you.

From selected readings, have students identify the four major functions of a manager. The students should be sure to react to the following questions: "At the first supervisory level, what do you think is the most important function of managers? Why?" "What type of programs or activities should the company offer to managers or potential managers in helping them improve their skills?" Their responses should be turned in to you.

Have students identify the four major functions of a manager. For each function, have students list two skills necessary in order to perform the function. Of the four functions, have students identify what they consider to be the most important for the first supervisory level and why.

References

LAP 56-330

Modern Supermarket Operations
Chapter 5

Retailing Principles and Practices
Part 57

Front End Operations

Business in Marketing
Chapters 3, 4

Growing on the Job
Unit 1

Cluster Instructional Objective: ABILITY TO RELATE PERSONAL INCOME AND PROSPERITY TO ADVANCEMENT ON THE JOB

W-1

Marketing/Economics 5

What Does the Competent Marketing Employee Do?

1001-Attitude

Belief that personal advancement and prosperity can be determined by the contribution they make to the success of the business in which they are employed. (Income and Spending)

Common to
General Retail Merchandising

Suggested Learning Activities

Ask the following question. "Who in here thinks that they are making what they are worth where they work?" Ask them why and then determine what they think they are worth. After this has been established, go along with the increase in wage. Then ask them what they would do in order to justify the increase in wages. Discuss their comments.

The following will be a values clarification exercise. Have students list five items that they would like to have within the next three years. Also have them estimate the approximate value of these items. Then determine how they would pay for these items. If answers come from a higher paying job or increased wage from their present job, then discuss with them how persons can achieve prosperity by advancement due to job performance.

References

Human Relations in Marketing
Chapter 7
(2nd Edition)

Retailing Principles and Practices
Part 3, 21, 38

Retail Merchandising
Chapter 19

Marketing and Distribution
Part 45

Cluster Instructional Objective: UNDERSTAND THE RISK POSSIBILITIES THAT BUSINESSES ARE EXPOSED TO

W-2

5 Marketing/Economics

What Does the Competent Marketing Employee Do?

1009-Knowledge of/or Understanding that

Understand the possibilities of loss that businesses are exposed to.

Common to Food Marketing

Suggested Learning Activities

Discuss with the students the nature of our economic system dealing in goods and/or services, how it works, what effects it, and what the future projections are.

Have each student identify their projected career choice. Then draw the similiarities of choices as they apply to the opportunities in distributive occupations.

List a number of occupations and then ask students if they are distributive occupations. Then ask why. Have some common ones and some that don't look like distributive occupations.

References

Warehousing
Assignment 19

Wholesaling
Page 7

Retail Selling
Chapter 31

Retail Merchandising
Chapter 4, d
Chapter 17, d

Retailing Principles and Practices
Part 15

Modern Supermarket Operation
Page 123

Cluster Instructional Objective: KNOWLEDGE OF THE EFFECT OF GOODS AND SERVICES HAS ON CUSTOMER SATISFACTION

Marketing/Economics 5

What Does the Competent Marketing Employee Do?

1012-Knowledge of/or Understanding that

Knowledge of the goods and services offered to meet consumer needs and wants. --product

Common to
General Retail Merchandising

Suggested Learning Activities

Have students brainstorm about the types of services they offer the customer besides the original item either in the form of goods or services. Then after the list has been compiled, explore several or all of them in their relationship in helping the firm achieve customer satisfaction.

Select several items of goods or services. Have students list or tell of at least three selling points that could be used dealing with these goods or services. You can play the role of the customer and they can assume the role of a salesperson.

Develop a debate where the wholesaling career student must defend the position or argument that "The reason why consumer products cost so much is because of the middleperson." Allow preparation time for the wholesaling student for research and discussion with their training sponsors.

References

Marketing in Action
Chapter 11, 12

Marketing and Distribution
Part 23, 29, 38

Retail Merchandising
Chapter 6

Retailing Principles and Practices
Part 67, 68, 16

Cluster Instructional Objective: ABILITY TO COMPREHEND THE MOTIVE OF THE PRIVATE OR FREE ENTERPRISE SYSTEM

5 What Does the Competent Marketing Employee Do?

1013-Knowledge of/or Understanding that

Understand that profit is the driving force behind the free enterprise system which provides incentives, allocates resources, measures productivity, finances growth and gives society a control over business activities--profit.

Suggested Learning Activities

List the various forms of economic system (types of government) on the board. Ask for definitions of each. Based on the student's definitions, lead into a discussion on the merits of the private or free enterprise system.

Give the students the following case problem.

There are two types of firms that want to employ you as a worker. One firm offers you the same wage as an employee who has worked there for five years. The only difference in the job is seniority. The company offers no bonuses but guarantees you a job no matter what your job performance is like. Promotions are limited but possible.

The other firm starts you on a pay scale based on experience and years at the firm. Since you would be a new person starting with no experience, you would begin at the bottom. However, promotions are based on job performance which is constantly being evaluated by your supervisor. You also have the opportunity to immediately gain

(continued on following page)

References

Retailing Principles and Practices
Part 22, 40, 42

Retail Merchandising
Chapter 1

Marketing and Distribution
Chapter 1, 3, 4

Marketing in Action
Chapter 3

What Does the Competent Marketing Employee Do?

1013-Continued

Suggested Learning Activities

bonuses based on number of items picked and orders filled. (Or sales generated). There are several levels that you can attain before education becomes a factor in promotion.

Which firm would you want to work for and why?

References

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF THE PERSONNEL ORGANIZATION

W-1

6 What Does the Competent Marketing Employee Do?

759-Attitude

Attitude that lines of authority should be followed so that a department head or supervisor's position may not be weakened by management dealing directly with employers on matters that are logically in the supervisor's domain.

Commcn to Food Marketing

Suggested Learning Activities

Have students draw an organizational chart for their training stations. The students should identify lines of authority. Once everyone has an organizational chart, have a class discussion on why lines of authority should be followed.

Devise a case problem where an employee bypasses the department head to register a complaint. Have students discuss the problems which could be encountered as a result of this action.

References

LAP 1-759

Retail Merchandising
Chapter 5, e

Retail Principles and Practices
Part 57

Fundamentals of Selling
Chapter 7, e

Psychology and Human Relations in Marketing
Chapters 3, 7

Human Relations in Marketing
Chapters 4, 6
(2nd Edition)

Cluster Instructional Objective:

ABILITY TO RELATE THE VALUE OF JOB ORIENTATION AND TRAINING PROCESS TO EMPLOYEE SATISFACTION

W-2

Management

6 What Does the Competent Marketing Employee Do?

606-Knowledge of/or Understanding that

Knowledge and understanding of the ways to make job orientation for new employees friendly, skillful, and adequate.

Common to Food Marketing

Suggested Learning Activities

Have students think about the job orientation they received at their current training station. Students should jot down notes on the methods used for orientation. Then students should have their training sponsor or the personnel training director explain the techniques currently being used when orienting new employees. Students should make brief notes of the major points presented. Then students can write a brief summary of the techniques used when orienting personnel based on the students' experience and their visit with the training sponsor or personnel training director. This activity could be expanded by having students visiting employees to determine how they feel about the orientation process. Then the employees' opinions could also be included in the report. If you add the employee visits, the students should be encouraged to seek positive comments as well as negative ones.

Have students make a notebook of the procedures they would follow if given the responsibility of training a new employee. The students should include points on how they would make employees feel more comfortable on-the-job and during breaks.

References

LAP 9-606

Wholesale Management
Assignment 14

Modern Supermarket Operation
Chapters 5, 23

Produce Merchandising
Assignment 13

Grocery Merchandising
Assignment 2

Fundamentals of Selling
Chapter 7, e

Retail Merchandising
Chapter 5, e

Growing on the Job
Unit 1

Cluster Instructional Objective: COMPREHEND THE EFFECT OF MOTIVATION TO CUSTOMER TREATMENT W-3

Management

6 What Does the Competent Marketing Employee Do?

605-Knowledge of/or Understanding that

Knowledge and understanding of how to help each employee have a feeling of pride in ones' company and the worthwhileness of work.

Common to Food Marketing

Suggested Learning Activities

In groups of four or five, have students discuss the importance of fear, hope, and pride in the working environment.

Have students develop a questionnaire to determine if persons involved in business feel that salaries, commissions, bonuses, etc. have an influence on customer treatment and inter-personal relations of department personnel. Then the students should administer the questionnaire at several local businesses. The results of the survey should be summarized and presented to you.

Identify the class members who are currently employed or have had experience in the business field. Appoint these students as group leaders. Divide the remaining class members into sub-groups; one sub-group for each group leader. The group leader will need to develop examples from their work experience regarding employees' feelings as to how salaries, commissions, bonuses, and quotas have an influence on customer treatment and interpersonal relations of department personnel. After the group leader presents the examples, the other members of each group will discuss their feelings on this topic.

References

LAP 15-605

Fundamentals of Selling
Chapter 15, b

Human Relations in Business
Chapter 3

Retail Merchandising
Chapter 5

Retail Selling
Chapter 5

Human Relations in Marketing
Chapters 3 & 8
(2nd Edition)

Cluster Instructional Objective: ABILITY TO RELATE GOOD DELIVERY SYSTEM TO CUSTOMER SATISFACTION

Management

6 What Does the Competent Marketing Employee Do?

756-Attitude

An awareness that to improve delivery service, transactions should be recorded accurately and legibly and delivery dates promised carefully.

Common to General Retail Merchandising

Suggested Learning Activities

Have students do the following case problem.

CASE PROBLEM: A new store manager has announced that, effective next week, delivery of all items will be discontinued. The reason given for discontinuing this service is, "delivery services do not affect customers' attitudes toward the store." As the operations manager of the store, you have been asked to present a one-page "position" paper concerning your feelings about this change. Submit your position paper to the teacher for review.

Role playing situation: Have one student assume the role of supervisor over the delivery operations of a department store. Complaints have been increasing concerning the inefficient delivery service. The supervisor feels the sales personnel (the balance of the class) make delivery date promises to the customers that cannot realistically be met. The supervisor feels this is the primary reason for the customers' complaints. Next week the supervisor will have an opportunity to speak to all employees. Have the supervisor prepare a three to five minute presentation to explain the necessity

(Continued on following page.)

References

LAP 31-756

Fundamentals of Selling
Chapter 7, d

Retail Selling
Chapter 30

Retailing Principles and Practices
Part 69

Retail Merchandising
Chapter 5, b

Wholesaling and Physical Distribution
Chapters 5, 7
(2nd Edition)

6 What Does the Competent Marketing Employee Do?

756-Continued

Suggested Learning Activities

of accurate, legible, and realistic delivery date promises to customers.

Have students read the section on "Service Policies."

References

Cluster Instructional Objective: DEMONSTRATE AND REALIZE THE IMPORTANCE OF PREPARING A SALES CHECK

W-1

Mathematics

7 What Does the Competent Marketing Employee Do?

390-Attitude

Attitude that carefully calculating the exact amount of a customer's purchase will prevent inventory shortages.

Common to
General Retail Merchandising

Suggested Learning Activities

Have students read the following case problem and answer the three questions that follow:

Case Problem

A student neglected to write the stock numbers of merchandise sold on the sales check as required by the store manager. The next day, the manager informed the student of the mistake.

A. How should the student respond to the manager?
B. Why should the store manager be so concerned about the error?
C. Would there be any inconvenience to the customer?

Have students do a research project on causes of errors on sales slips. They can research the dollar amount of sales lost by poor inventory control by discussing this with the department or store manager.

References

LAP 10-390

Retailing Principles and Practices
Part 49

Retail Merchandising
Chapter 16, d

Fundamentals of Selling
Chapter 12, d

Retail Selling
Chapter 14

Wholesaling and Physical Distribution
Chapter 9

Cluster Instructional Objective: DEMONSTRATE SKILL IN KEEPING STOCK CONTROL RECORDS

Mathematics

7 What Does the Competent Marketing Employee Do?

379-Skill

Skill in maintaining mathematically correct stock control records.

Common to Food Marketing

Suggested Learning Activities

Have students report on methods of maintaining and correcting stock records.

Have students work with their training sponsor or supervisor and estimate stock requirements for succeeding months.

Invite a store buyer to speak on keeping stock control records mathematically correct.

In small groups, have students visit a small business which keeps a manual system of stock control records. Comparisons can be made by having students visit a business which uses an electronic inventory control system.

References

LAP 35-379

Retailing Principles and Practices
Part 13

Retail Selling
Chapter 15

Fundamentals of Selling
Chapter 12, d

Wholesaling and Physical Distribution
Chapter 8, 9

Mathematics in Marketing
Chapter 5
(2nd Edition)

Cluster Instructional Objective:

BE ABLE TO COMPREHEND THE IMPORTANCE OF INVENTORY CONTROL TO AVOID MERCHANDISE SHORTAGES

W-1

Merchandising

8 What Does the Competent Marketing Employee Do?

445-Skill

In recording the transfer of merchandise or stock to branch stores to prevent inventory shortages.

Common to Food Marketing

Suggested Learning Activities

Have students transfer books from the storeroom to the classroom and record the transferred merchandise on a transfer form.

Have students ask their training sponsor the procedure to be followed when merchandise is transferred from one branch to another. Then the students can prepare a short oral report on the procedure.

Utilize this skill in inventory control if you have some type of fund raising using goods.

References

LAP 3-445

Mathematics in Marketing
Chapters 5, 6

Retail Merchandising
Chapter 17, c

Fundamentals of Selling
Chapter 17

Retailing Principles and Practices
Parts 14, 15

Retail Selling
Chapter 15

Wholesaling and Physical Distribution
Chapters 5, 6, 7, 9

Cluster Instructional Objective: ABILITY TO DETERMINE INVENTORY FOR BUYING FOR FOR RESALE

8 What Does the Competent Marketing Employee Do?

402-Knowledge of/or Understanding that

Stock counts are taken for inventory-control purposes and for ordering purposes.

Suggested Learning Activities

Have students illustrate the inventory procedures for ordering purposes at their training stations or have them visit some local firm. Also have them determine the importance of data processing, if it is used by the firm or if it will be in the future.

If your school has a storeroom or a bookstore or some other type of place that carries inventory, ask if your class can pull inventory and then discuss the results at the next class meeting on the purposes of taking an accurate inventory.

References

LAP 10-402

Retail Selling
Chapter 15

Retailing Principles and Practices
Part 49

Retail Merchandising
Chapter 15

Wholesaling and Physical Distribution
Chapter 9
(2nd Edition)

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF AN UP-TO-DATE INVENTORY CONTROL SYSTEM

8 What Does the Competent Marketing Employee Do?

490-Attitude

A belief that unit inventory control systems must be kept up-to-date if they are to be useful in planning and making purchases.

Suggested Learning Activities

Have students list possible solutions to case problems where goods are not properly recorded.

Have students complete case problems for small group discussion. They should list possible outcomes as well as problems that arise if unit inventory control systems are not kept up-to-date.

Have students bring in labels like the ones used by wholesalers to identify the merchandise, etc. With an opaque projector, show the different kinds used and explain the parts of each one that deals with merchandise control.

Have students discuss cases from their training stations based on inaccurate inventory records.

References

LAP 31-490

Retail Selling
Chapter 16

Retailing Principles and Practices
Part 49

Retail Merchandising
Chapter 17

Warehousing
Assignment 15

Wholesaling and Physical Distribution
Chapters 8, 9

Cluster Instructional Objective: ABILITY TO HANDLE INCOMING MERCHANDISE

Operations

9 What Does the Competent Marketing Employee Do?

701-Skill

Skill in determining shipping and receiving discrepancies and taking the proper action.

Common to Food Marketing

702-Skill

Skill in quickly routing merchandise from the receiving dock to the proper selling department or its designated stock area in the warehouse.

OTHER CLUSTER COMPETENCIES:

784-Attitude

Suggested Learning Activities

Have students prepare a bulletin board showing how merchandise is routed from the receiving dock to the proper selling department.

Have students visit a department store and have the manager walk them through the route merchandise follows from the receiving dock to the proper selling departments.

Have students read the section on "Receiving and Checking."

Have students read the section on "Storing and Arranging Merchandise."

Have students read the chapter on "Receiving and Marking Merchandise."

or

Have students read the section on "Storing and Arranging Merchandise."

or

Have students read the chapter on "Receiving and Marking Merchandise."

References

LAP 4-701

Retailing Principles and Practices
Part 13

Retail Merchandising
Chapter 9, d

Retail Selling
Chapter 33

Warehouse Management
Assignment 15

Grocery Merchandising
Assignment 10

Operations

9 What Does the Competent Marketing Employee Do?

702-continued

Suggested Learning Activities

Then have them prepare a short talk or paper on the importance of routing merchandise.

References

Operations

9 What Does the Competent Marketing Employee Do?

784-Attitude

Recognize losses because of damaged or spoiled merchandise must be kept at a minimum to protect the store's profit picture.

Common to Food Marketing

OTHER CLUSTER COMPETENCIES

701-Skill
702-Skill

Suggested Learning Activities

Have students read the following case study and then answer the following questions:

A grocery store ordered six cases of apple sauce, three cases of which were in cans at $4.20 each and three cases in glass jars at $4.80 per case. When the stockperson was moving the above merchandise to the sales floor, the stockperson ran the two-wheel hand truck into a customer's grocery cart, causing two cases to fall to the floor. One case contained twelve glass jars, six of which broke. The other case contained twelve cans of apple sauce, five of which were badly dented. Retail selling price per case of canned apple sauce is $5.40 and per case of glass jars of apple sauce is $6.00. Assume that the dented and broken merchandise is not salable.

1. Identify the losses and their costs.
2. Determine the percentage of the total cost of goods which are not salable.
3. Determine how much of the gross sales is lost because of the non-salable items.
4. Determine the total retail value of the original order.

(Continued on following page)

References

LAP 4-784

Modern Supermarket Operation
Assignment 1, 14, 15, 28

Buying Guide,
Pages 1-15

Display Ideas for Supermarkets
Chapter 12

Stocking, Marking and Displaying
Assignments 19, 20

Warehousing
Assignments 9-19

Merchandising in Action
Chapter 3

Grocery Merchandising
Assignment 12, 24

Cluster Instructional Objective: ABILITY TO HANDLE INCOMING MERCHANDISE (CONTINUED)

Operations

9 What Does the Competent Marketing Employee Do?

784-Continued

Suggested Learning Activities

5. What percent of the total retail value is the retail value of the goods lost?

Have students identify examples of how merchandise has been damaged or spoiled due to employee mishandling. Have them estimate how much money was lost due to the errors, how the errors could have been corrected, and why this is important to the store's profit picture.

References

Cluster Instructional Objective:

ABILITY TO COMPREHEND THE IMPORTANCE OF A STORE'S RECEIVING PROCEDURES

W-5

9 What Does the Competent Marketing Employee Do?

638-Knowledge of/or Understanding that

The procedures involved in checking merchandise in against an invoice.

Common to Food Marketing

Suggested Learning Activities

Have students ask the person responsible for receiving shipments at the school to explain the step-by-step process of accepting a shipment. Then students can compare the school's process with that of some other business (could be their training station).

Set up for a role-play the process followed for receiving a shipment of merchandise from a trucking company. You will need to collect a quantity of boxes and papers representing the necessary forms. One student should represent the receiving clerk and another should represent the shipper. Other students could be additional receiving assistants. The rest of the group should observe the role-play situation and make on improving the procedure.

Have students visit the receiving department of a local warehouse. They should have the manager show them the procedures followed in accepting a shipment from a carrier.

Have students read the chapter on "Receiving and Marking Merchandise."

References

LAP 5-638

Retail Selling
Chapter 33

Retail Merchandising
Chapter 9, b

Retailing Principles and Practices
Part 13

Warehouse Management
Assignment 15

Grocery Merchandising
Assignment 10

Wholesaling and Physical Distribution
Chapters 5, 7, 8

Operations

Cluster Instructional Objective: ABILITY TO HANDLE INCORRECTLY RECEIVED MERCHANDISE

Operations

9 What Does the Competent Marketing Employee Do?

639-Knowledge of/or Understanding that

Knowledge of the procedures for handling incorrect amounts or types of merchandise received.

707-Skill

In handling incorrect amounts or types of merchandise received.

Common to Food Marketing

OTHER CLUSTER COMPETENCIES:

760-Attitude

Suggested Learning Activities

Conduct a class discussion or have students debate on which procedure is best when returning merchandise. Students could use their training station procedure as an example.

Have a group of students make a bulletin board illustrating the variety of possibilities available for disposing incorrect amounts or types of goods received by a store. Each member of the group should describe one of the procedures involved in handling the incorrect merchandise. A tape recording should be made of each student's description. When someone is looking at the bulletin board they can play the recording.

References

LAP 7-639

Retailing Principles and Practices
Part 13

Retail Merchandising
Chapter 9, b

Retail Selling
Chapter 33

Warehouse Management
Assignment 15

Grocery Merchandising
Assignment 10

Wholesaling and Physical Distribution
Chapters 5, 7, 8
(2nd Edition)

Cluster Instructional Objective: ABILITY TO HANDLE INCORRECTLY RECEIVED MERCHANDISE

Operations

9 What Does the Competent Marketing Employee Do?

760-Attitude

An awareness that to prevent shortages, merchandise being returned to vendors must be correctly recorded in inventory control records.

Common to Food Marketing

OTHER CLUSTER COMPETENCIES

639-Knowledge of/or Understanding that
707-Skill

Suggested Learning Activities

Have students complete one of the following case problems.

Case Problem #1: The ABC Department Store ordered a variety of items from Morris Wholesale Supply for a special sale on February 2. On January 10 they received shipment of the goods and discovered the following problems:

A. Of 2 dozen typewriters, 4 had paint chipped off the cover and one was dented beyond repair.
B. 500 reams of erasable bond typing paper at $1.00 per ream was ordered. Instead, they received 600 reams of a somewhat inferior quality paper at 80¢ a ream and were billed for the one shipped.
C. 100 notebooks were received instead of 150 notebooks. There was no backorder information on the invoice.

Decide what steps should be taken in handling each problem.

Case Problem #2: A wholesaler made a special truckload deal for an assortment of Welch's products including jam, jelly, and juices in a variety of sizes and containers.

(Continued on following page)

References

LAP 7-760

Retailing Principles and Practices
Part 13

Retail Merchandising
Chapter 9, b

Retail Selling
Chapter 33

Warehouse Management
Assignment 15

Grocery Merchandising
Assignment 10

9 What Does the Competent Marketing Employee Do?

760-Continued

Suggested Learning Activities

After the truck has been unloaded you were 7 cases short out of 500. You only took a total count.

Decide what steps should be taken in handling this problem.

References

Cluster Instructional Objective:

ABILITY TO UTILIZE PRICE MARKING TOOLS TO HELP CONTROL STOCK MANAGEMENT

9 What Does the Competent Marketing Employee Do?

697-Skill

Ability to use the different types of price marking tools.

Suggested Learning Activities

Secure from a local wholesaler, some training films dealing with equipment operation. Show the films to the students and then compare the film with what the students use and do on the job.

Have students secure from their training station, several different types of pricing tools that they use on the job. Have them demonstrate to you the correct procedure for the operation of the tools.

If pricing tool operation manuals are available from local wholesalers, secure copies for instructional use for the students and also determine the sequencing used in pricing merchandise.

Gather machines on loan from a source like Monarch or have a sales representative bring several to demonstrate the machine's operation to the students.

References

LAP 12-697

Working for a Wholesaler
Page 81

Wholesaling & Physical Distribution
Chapter 5, 8
(2nd Edition)

Retailing Principles and Practices
Part 14

Retail Merchandising
Chapter 9

Cluster Instructional Objective:

COMPREHEND THAT CONTROLLING EXPENSES SHOWS A DIRECT IMPACT ON THE STORE'S PROFIT PICTURE

W-10

Operations

9 What Does the Competent Marketing Employee Do?

617-Knowledge of/or Understanding that

Understand that although management plans expense control budgets, the actual control must be carried out by the cooperative effort of all store employees.

Common to
Food Marketing

Suggested Learning Activities

Have students give at least one example of how employees can help control expenses for each of the following expense areas: receiving, pricing and marking, customer services, stocking, payroll expense.

Give students a case problem in which they have just been hired as the general manager. Until three years ago their store had an increase in both sales and profit each year. Since that time, sales have remained steady, but expenses have gone up to the point where the store has lost money this past year. The bookkeeper has given the manager an analysis of the store's operations: gross sales - $500,000; cost of goods, $300,000; fixed expenses, $50,000; payroll and fringes, $60,000; other variable operating expenses, $20,000; advertising, $25,000; shortages and markdowns, $40,000; closing inventory, $200,000 at retail.

Have students list at least four areas of expense and give at least two ways expenses may be controlled for each area.

References

LAP 15-617

Modern Supermarket Operation
Assignment 5, 9, 11

Stocking, Marking and Displaying
Assignment 19, 20

Fundamental Store Operations
Assignment 1, 13

Front End Operations
Assignment 10

Wholesale Management

Wholesaling
Chapter 3

Grocery Merchandising
Assignment 7

Cluster Instructional Objective:

COMPREHEND THE EFFECT OF CREDIT OPERATIONS TO THE BUSINESS'S TOTAL OPERATION

Operations

9 What Does the Competent Marketing Employee Do?

680-Skill

Skill in accurately handling and recording customer payment of bills.

Common to General Retail Merchandising

Suggested Learning Activities

Obtain sample credit payment forms. Devise problems and have students practice completing these forms.

Have students visit the credit department of a store to find out how that business handles the recording of customer payments. Students should bring back examples of forms used. Students should invent problems for exchanging with classmates.

References

LAP 19-680

Retail Selling
Chapters 12, 13

Retail Merchandising
Chapter 12, a

Retailing Principles and Practices
Parts 10, 12, 28-30

Modern Supermarket Operations
Assignment 11

Front End Operations
Assignments 5-8

Wholesaling & Physical Distribution
Chapters 7, 8
(2nd Edition)

Cluster Instructional Objective:

ABILITY TO RELATE THE VALUE OF GOOD MEAT AND PRODUCE QUALITY CONTROL TO CUSTOMER SATISFACTION

W-12

9 What Does the Competent Marketing Employee Do?

724-Skill

Ability to determine when newly-received produce is of unsatisfactory quality and should be returned to the supplier or warehouse.

Common to Food Marketing

Suggested Learning Activities

Have students collect pictures (draw, trace, copy, or cut out) of the most common produce items. Have students make a notebook of these pictures and identify quality factors for each item.

For each of the following items, have students explain which ones would be returned to the seller and why:

1. Grapes falling off the stem
2. Globe onions with new sprouts
3. Flabby carrots with extra long roots
4. Cauliflower with loose curd
5. Snap beans with a velvety touch
6. Pineapple with purplish-green skin color

References

LAP 28-724

Warehousing
Assignments 10-16

Wholesaling
Chapter 6

Wholesale Management
Assignment 5

Produce Merchandising

Operations

Cluster Instructional Objective: ABILITY TO DEAL WITH FORM NECESSARY FOR STOCK CONTROL TO AVOID STOCK SHORTAGES

9 What Does the Competent Marketing Employee Do?

1151-Knowledge of/or Understanding that

The procedure for notifying proper individuals when stock is short or out.

1154-Skill

In filling out all necessary order forms accurately and completely.

Suggested Learning Activities

Have students relate the procedure of notifying proper individuals where stock is short or out. Evaluate procedures as to clarity and understandability.

If other wholesaling students are present, compare procedures by firm and merchandise. Explore the use of the computer in spotting low stock.

Have students bring in several order forms to explain to you or other wholesaling students all the various parts and how to fill it out.

Have several various order forms that have been correctly filled out. Ask the students to identify the errors and then explain if it makes a difference when forms are not filled out or even if you can't read some of the words or numbers.

References

Merchandising
Chapter 3
(2nd Edition)

Retail Merchandising
Chapter 9

Wholesaling & Physical Distribution
Chapters 8 & 9
(2nd Edition)

Retailing Principles & Practice
Unit 17

Operations

Cluster Instructional Objective: ABILITY TO RELATE GOOD ORDER FILLING PROCEDURES TO EFFICIENT WAREHOUSE OPERATIONS

Operations

9 What Does the Competent Marketing Employee Do?

1155-Knowledge of/or Understanding that

Knowledge of the procedures for filling orders.

1156-Skill

Skill in properly selecting merchandise for filling orders.

1157-Knowledge of/or Understanding that

The procedures for spotting and unloading filled orders within the warehouse.

Suggested Learning Activities

Have students outline their procedure for filling orders at their training station. Then compare each procedure step-by-step on the blackboard to determine if there is a difference. Discuss the differences. Also determine if automation present at the warehouse makes a difference in those procedures.

Have students demonstrate with sample merchandise how orders are filled. As they are demonstrating (this can be done with two or three giving the presentation together) have them explain why the procedures are set up like they are. Discuss any questions.

Present a case problem complete with an overlay showing a congested warehouse. Ask the students to determine some way out of the mess which seems to stem from once the order is filled; these completed orders block the aisles. Make sure the illustration has numerous aisles with space available for truck loading. After the students have determined what the problem is, ask them for the procedures necessary to insure that the congestion is stopped and a smooth flow of filled orders to the loading dock is maintained.

References

Warehousing
Assignment 17

Materials Handling
Unit 3

Wholesaling
Chapter 3, 6

Wholesale Management
Assignment 15

Retailing Principles and Practices
Unit 4

Working for a Wholesaler
Pages 73-110

Wholesaling and Physical Distribution
Chapter 9
(2nd Edition)

9 What Does the Competent Marketing Employee Do?

1158-Knowledge of/or Understanding that

Understand the importance of the care and proper cleaning of the tools and/or equipment used on the job.

Suggested Learning Activities

Have students discuss with their training sponsor or supervisor how employees can help care for equipment through proper handling. Then students should develop a list of ways employees should handle and care for equipment. The students should turn the list in to you.

Have students prepare a bulletin board display showing ways employees should properly handle and care for equipment such as safety items that they could get from work.

Have students design a poster that could be used to promote proper handling and caring of equipment at their training station. Then have students obtain permission to post the sign at their training station.

Have students brainstorm the topic "What I Can Do to Aid in Handling and Caring for Equipment."

References

Stocking, Marking and Displaying
Assignment 20

Warehouse Management
Assignment 15

Retailing, Principles and Practices
Part 32

Modern Supermarket Operations
Chapter 22

General Merchandising
Assignment 2, 7, 10, 11

Wholesaling and Physical Distribution
Chapter 9
(2nd Edition)

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF PROPERLY HANDLING PRODUCE

Operations

9

What Does the Competent Marketing Employee Do?

1159-Knowledge of/or Understanding that

Understanding that a neat, clean backroom stock and work area is necessary in stockkeeping.

Suggested Learning Activities

Try to take some slides of backroom areas. After a presentation on the importance of having an efficient stock and work area, show the slides in order to have the students determine what could be done to improve the situation. If slides are not available, illustrations from professional journals in wholesaling could also be used with an opaque projector.

Have students with a career objective in this area draw out the stock area of their training station. Give them a presentation on why it is necessary to have a clean backroom or stock area in order to help the work flow. Then show each illustration that the students have done and critically examine each to determine if additional items could be done to improve the situation.

References

Retailing Principles and Practices
Unit 5

Warehousing
Assignments 10-20

Warehouse Management
Assignment 15

Materials Handling
Unit 8
Part 36

Wholesaling
Chapter 3

Grocery Merchandising
Assignment 12

Produce Merchandising
Assignment 4-6

Wholesaling & Physical Distribution
Chapters 8, 9
(2nd Edition)

Cluster Instructional Objective:

COMPREHEND THAT STORE POLICIES DEALING WITH EMPLOYEES ARE WRITTEN FOR THE BENEFIT OF BOTH THE EMPLOYER AND THE EMPLOYEES

W-17

Operations

9

What Does the Competent Marketing Employee Do?

1160-Knowledge of/or Understanding that

Knowing the rules and regulations of the firm relative to signing in (reporting for work) and checking out (leaving the store).

1161-Knowledge of/or Understanding that

Knowing the procedures or policies for leaving the work area for short periods during regular working hours.

1162-Knowledge of/or Understanding that

Knowledge of the rules and regulations pertaining to lunch and other similar breaks.

(Continued on following page.)

Suggested Learning Activities

For listed competencies on this page, break the class into small groups and have three groups acting as a management consulting firm and the other three groups as employees. Each groups will represent one of the three areas that the competencies cover. Have each group write what they think is a "fair" policy dealing with (a) signing in and out, (b) leaving the work area for short periods and (c) breaks. Remind the small groups dealing with this from the management side, that they do in fact represent management. After several minutes, have each group report or have them write the policy on the board and then compare each set of policies. Discuss the results.

Have students acquire their training station's policy handbook and determine what the policies are pertaining to sick days, early leave, tardiness, lunch breaks, etc. Then have them critically evaluate each of the policies to determine if they think they are "fair." If not, ask them for suggestions, if they think they are, determine why. This could be done either in written form or orally.

(Continued on following page.)

References

Human Relations in Marketing
Chapters 4, 6
(2nd Edition)

Retailing Principles and Practices
Parts 20, 21, 39
56, 57

Fundamentals of Selling
Chapter 7, e

Retail Merchandising
Chapter 5, e

Warehouse Management
Assignment 5,14

Front End Operations
Assignment 1,13

Produce Merchandising
Assignment 13

Grocery Merchandising
Pages 1,2

Cluster Instructional Objective: COMPREHEND THAT STORE POLICIES DEALING WITH EMPLOYEES ARE WRITTEN FOR THE BENEFIT OF BOTH THE EMPLOYER AND THE EMPLOYEES (CONTINUED)

Operations

9 What Does the Competent Marketing Employee Do?

1163-Knowledge of/or Understanding that

Knowledge of the rules, policies, and/or regulations pertaining to absenteeism of personnel.

Common to Food Marketing

Suggested Learning Activities

Have students do a small research project on the expense of employee absenteeisms and how it affects operations. They can get this information from management journals or personnel management journals. This could be a written report.

References

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF KNOWING EMERGENCY EQUIPMENT LOCATIONS

9 What Does the Competent Marketing Employee Do?

1164-Knowledge of/or Understanding that

Knowledge of the location of fire extinguishers and other emergency equipment.

Suggested Learning Activities

Have several illustrations of a warehouse layout. Ask the students where they think the fire extinguishers and other emergency equipment should go. Also discuss what other type of emergency equipment should be available to the warehouse personnel and why. Discuss why the students chose a particular location for the emergency equipment.

Contact either the local fire department or the student's training station to determine if any firefighting films are available that would be similar to what an employee should know about emergency situations. Show the film and discuss the content.

Visit the local fire station for a lecture and possible demonstration on operation of fire equipment and other emergency equipment that would apply to a warehouse operation.

References

Retail Merchandising
Chapter 4, d

Retail Selling
Chapter 6

Wholesale Management
Assignment 15

Materials Handling
Part 36

Warehousing
Assignment 19

Growing on the Job
Chapter 5

Cluster Instructional Objective: ABILITY TO DEMONSTRATE KNOWLEDGE IN STOCKING OR RE-STOCKING SHELVES

W-20

9 What Does the Competent Marketing Employee Do?

1165-Knowledge of/or Understanding that

Understanding the proper method of stocking or re-stocking shelves.

Suggested Learning Activities

Develop a work-flow chart tracing the arrival of merchandise to the wholesaler. From that point, have the student fill in the rest of the flow chart showing how the training station or a local wholesale firm moves the merchandise from the receiving point to the warehouse floor.

Have a list of 5 to 7 items of merchandise and then have students illustrate how best this type of merchandise can be stored on the warehouse floor in order to be ready for picking. Include in this project the procedure for re-stocking merchandise on the warehouse floor.

Show illustrations of the various ways in which merchandise can be placed on pallets. Hand this illustration to the students. Then have them identify the strengths or weaknesses of each type of stacking method dealing with merchandise on pallets.

References

Wholesaling & Physical Distribution
Chapters 8, 9

Working for a Wholesaler
Pages 55, 73

Retail Merchandising
Chapter 9

Marketing & Distribution
Part 28

Retailing, Principles and Practices
Parts 13, 14, 15

Operations

Cluster Instructional Objective: COMPREHEND THE IMPORTANCE OF HANDLING FOOD PROPERLY TO AVOID LOSSES

W-1

Product and/or Service Technology

10

What Does the Competent Marketing Employee Do?

570-Skill

Ability to handle foods or merchandise in such a way as to protect their values and avoid undue losses.

Suggested Learning Activities

Have students demonstrate how to correctly fill orders so the food or merchandise values are protected and losses are avoided.

Demonstrate to students the correct way to package merchandise for shipment. Then have students practice until they have mastered the technique.

Have students determine what extra steps are necessary if the wholesaling firm is dealing with perishable merchandise versus staple goods.

Have the wholesale student compare what steps they would take in order to protect the merchandise from damage. List on the board and discuss the similarities and differences and then determine why goods must be treated differently.

References

LAP 7-570

Warehousing
Assignments 13, 18

Physical Distribution
Chapter 10

Materials Handling
Parts 34, 35, 36

Wholesaling & Physical Distribution
Chapters 8, 9
(2nd Edition)

Cluster Instructional Objective: ABILITY TO RELATE THE IMPORTANCE OF SELLING, TO A STORE'S OPERATION

W-1

11 What Does the Competent Marketing Employee Do?

923-Attitude

An attitude that selling is important to the store and/or wholesaling company and to the economy.

Common to Food Marketing

Suggested Learning Activities

Have students briefly trace the history of selling for the last 100 years. Have students develop a list of important events and how it relates to the development of the economy.

Have students trace the history of either wholesaling or food distribution for the past 50 years. Have students develop a list of important events and dates and how these events helped the free enterprise system develop to what it is today.

Have students orally present to the class the importance of either the wholesaling or the food distribution industry and the role that wholesaling (or food distribution) plays in the American economy.

Have students write a paper on the duties of a salesperson in wholesaling or food distribution and how these duties differ, if at all, from that of a salesperson in retail and industrial sales.

Have the food marketing students react to the statement, "Since everyone has to eat, supermarkets don't really need an effective sales technique from their grocery clerks." Discuss their viewpoints as a class.

References

LAP 2-923

Marketing and Distribution
Parts 18, 34

Wholesaling
Chapters 7, 8

Wholesaling in Distribution
Assignment 7

Materials Handling
Part 33

Marketing in Action
Chapter 5

Basic Selling
Chapter 1
(2nd Edition)

Creative Selling
Chapter 4
(2nd Edition)

Wholesaling & Physical Distribution
Chapters 1, 2, 10

Selling

Cluster Instructional Objective: ABILITY TO RELATE THE VALUE OF PROPER STOCK CARE

11 What Does the Competent Marketing Employee Do?

340-Knowledge of/or Understanding that

Knowledge of the housekeeping duties which must be performed in connection with proper stock care.

Common to General Retail Merchandising

Suggested Learning Activities

Have students visit with the manager of their training station to see how housekeeping functions are performed and the rationale behind why housekeeping is done. Then have students get into groups to discuss the different types of housekeeping procedures for the various training stations.

Have students write a brief report on what "ratting" is and why it should not be done in the wholesaling industry. Also have the students outline the procedure for the removal of damaged or broken stock from the warehouse or stockroom or sales floor. They should explain what their housekeeping responsibilities are as sales persons.

Give students a form ruled similar to the one below.

Item	Description of correct method for shelving or stocking	Does this item need to be sorted into style, color, size, etc.

Have students select 10 items sold at their training station and complete the form. With the help of training sponsors, have

(Continued on following page)

References

LAP 23-840

Fundamentals of Selling
Chapter 12, d, e

Retail Merchandising
Chapter 9, 11, b

Retail Selling
Chapter 6, 16

Retail Principles and Practices
Part 14

Wholesaling & Physical Distribution
Chapters 8, 9

11 What Does the Competent Marketing Employee Do?

840-Continued

Suggested Learning Activities

students devise a check list of housekeeping duties which must be routinely performed at their training station.

Have one student with supervisory ability assume the role of an assistant manager. Have several other students assume the role of the employees. The situation will be that the litter and damaged goods are becoming a problem because of the unsightliness of it and also it restricts work flow. After the case has been presented, have the rest of the class react to what went on.

References

Cluster Instructional Objective:

ABILITY TO RELATE WHY ORGANIZING STOCK IS NECESSARY FOR SUCCESSFUL SELLING THROUGH INVENTORY CONTROL

11 What Does the Competent Marketing Employee Do?

837-Knowledge of/or Understanding that

Knowledge of how to prepare or organize stock for accurate and fast counting during an inventory.

Common to General Retail Merchandising

Suggested Learning Activities

Have students prepare a report, outline, or floor drawing on how merchandise is divided according to major categories in a selling department.

Have students make a field observation of one department of a major business establishment. The students should list the major merchandise areas, specific merchandise included in each area and merchandise included in the major merchandise area.

Have students make an outline of the major stock areas in a department store, how merchandise is arranged in those major stock areas, and what principle stock items can be displayed.

Have students read the sections on "Taking a Physical Inventory" and "Stockkeeping."

References

LAP 25-837

Materials Handling
Part 32

Retail Selling
Chapter 16

Fundamentals of Selling
Chapter 12, d

Merchandising
Chapter 3
(2nd Edition)

Wholesaling & Physical Distribution
Chapter 9

Cluster Instructional Objective:

COMPREHEND THE EFFECT OF ADDING VALUE TO MERCHANDISE BY CORRECTLY MOVING AND STORING IT

11

What Does the Competent Marketing Employee Do?

924-Attitude

An attitude that value is added to merchandise that is handled with care and respect.

Common to Food Marketing

Suggested Learning Activities

If the students training station has a repack unit (one that takes partial cases of merchandise and repacks for whole cases), have the students observe the procedure involved in this operation. Have students ask why so much merchandise is damaged and what can be done to prevent the damage from happening. Have students summarize their visit in a short report to be turned in to you.

If a student's training station does not have a repack unit, have the student trace the steps necessary for returning damaged merchandise, steps taken to prevent the merchandise from being damaged, and identify how much it costs the wholesaler or retailer to deal with merchandise that is damaged. Have the students turn in their report to you.

Have students explain the procedures for handling damaged merchandise at their training stations. Then have the students explain what they would do to correct the problem. The students should also report how much money they think damaged merchandise costs "everyone" concerned.

References

LAP 44-924

Retail Selling
Chapter 22

Warehousing
Assignment 18

Physical Distribution
Chapter 10

Materials Handling
Parts 28, 35

Wholesaling & Physical Distribution
Chapters 8, 9